

POLICY SERVICES

ADVISORY

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Policy Advisory No. 1066.....*NEW* Regulation DJ-R — Purchasing Ethics

Summary

Policy Advisory Discussion

Policy Advisory No. 1066

Regulation DJ-R — Purchasing Ethics

Regulation DJ-R has been created to provide corresponding implementation requirements which incorporates new Uniform System of Financial Records (USFR) guidance, including procedures for authorized events, establishing expense limitations, and documenting authorized food and beverage purchases.

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If you have any questions, please call Policy Services at (602) 254-1100. Ask for Dr. Charlotte Patterson, Policy Analyst; Lynne Bondi, Policy Analyst; or Renae Watson, Policy Technician. Our e-mail addresses are, respectively, [cpatterson@azsba.org], [lbondi@azsba.org] and [rwatson@azsba.org].

Note: This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

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DJ-R ©

REGULATION

PURCHASING ETHICS

**(Events and Expense Limits of Food and Beverage Purchases
for Board Members, Staff, Students, and Community)**

District food and beverage purchases shall comply with Governing Board Policy DJ and advanced authorization by the Superintendent for the following events and expense limitations. Governing Board approval is required in advance of purchases outside of these parameters.

Events:

- A. Governing Board meetings, workshops, and retreats, regardless of how titled.
- B. Emergency operations that require employees to remain on duty after hours.
- C. District leadership meetings.
- D. New employee training and orientation.
- E. District-sponsored employee training and professional development.
- F. Employee recruitment activities and student recruitment fairs.
- G. Beginning and end of year events.
- H. Parent-Teacher Conferences.
- I. Student activities approved by the Superintendent or designee.

Expense Limitations

Districts choose option 1 or option 2.

Option 1:

Food and beverages shall not exceed the limits set forth in the State of Arizona Accounting Manual (SAAM) for per-person and per-meal.

OR

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Option 2:

The following per-person dollar limits shall not be exceeded for food and beverages, including taxes, gratuities and/or delivery costs. (District enters amounts)

Breakfast \$ _____

Lunch \$ _____

Dinner \$ _____

Snacks and refreshments \$ _____

Other Limitations

Prior to each food and/or beverage purchase authorized by this regulation, the District fund or funds from which the purchase will be paid shall be identified in writing. No such purchase shall be paid from a District fund unless the expenditure of that fund for food and beverages is authorized by law.

To demonstrate compliance with the Arizona Constitution, applicable state law, the Uniform System of Financial Records, and Governing Board policy, the District shall prepare and maintain documentation for each food and/or beverage purchase authorized by this regulation and retained in accordance with the records retention schedules.

No District funds shall be expended for alcoholic beverages.

Delegation

Pursuant to Arizona Revised Statutes §15-341(F), the Governing Board delegates to the Superintendent the authority to prescribe any administrative procedures necessary to implement this regulation.

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